

check of the investment parameters with data obtained from a LifePath model and personal investment parameters.

With continuing reference to Figure 8, the coaching by the coaching engine 278 relating to the setting of the asset mix parameters in operation 280 provides a rationalization of the asset mix based on personal and financial parameters of the subject and at least one computer generated asset mix. A pie chart may also be included that represents a portfolio showing the subject's assets.

In the Claims:

Please amend the claims as follows:

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1. A method for providing a graphical user interface to a financial modeling system allowing both live advice and automated coaching comprising:
providing a plurality of icons for selecting at least one of a plurality of methods for communicating with a live advisor over the Internet;
providing a first window for displaying an image of said live advisor; and
providing a second window for displaying context sensitive automated coaching.
9. A system for providing a graphical user interface to a financial modeling system allowing both live advice and automated coaching comprising:
an user interface generator coupled to the Internet providing a plurality of communication icons for selecting one of a plurality of communication methods with a live advisor over the Internet;
a display generator coupled to the Internet for providing a first window for displaying an image of said live advisor; and
an automated coaching engine coupled to the Internet for providing context sensitive automated coaching in a second window.

B | } 18 A computer program embodied on a computer readable medium for providing a graphical user interface to a financial modeling system allowing both live advice and automated coaching comprising:

code segment for providing a plurality of icons for selecting at least one of a plurality of methods for communicating with a live advisor over the Internet;

code segment for providing a first window for displaying an image of said live advisor ;
and

code segment for providing second window for displaying context sensitive automated coaching.
